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ABSTRACT

This paper discusses strategic planning for and the expansion of distance education in South Africa as a way to meet the demand for higher education while ensuring that such education is relevant to the stakeholders. An analysis of the forces changing higher education in South Africa notes the increased demand for higher education, the need to maintain quality in the face of increasing numbers and diminishing resources, the need for technological development and a skilled work force to drive a technology-based economy, and the constantly decreasing government subsidy to university operation--all trends that call for a pro-active response. Next discussed is the role of distance education as a likely way to address the pressures on universities. This response must use strategic planning to produce a pro-active plan and a control procedure to maintain relevance. A six-phase model for such strategic planning is presented. The phases are: (1) commitment to planning; (2) establishment of the official mandate; (3) data-gathering; (4) synthesis of data into appropriate projects; (5) implementation of project plans; and (6) outcomes evaluation. (Contains 16 references.) (JB)

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INSTITUTIONAL RELEVANCE IN DISTANCE EDUCATION: THE ROLE OF STRATEGIC PLANNING

Paper presented at the 16th World Conference of the Council for Distance Education, Bangkok, Thailand, 9-13 November 1992.

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INSTITUTIONAL RELEVANCE IN DISTANCE EDUCATION: THE ROLE OF STRATEGIC PLANNING

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Introduction

The higher education environment in South Africa is faced with rapid and profound changes, as is society in general. Distance education is regarded by many as the most viable option to meet future educational needs at tertiary level (Adler, 1992). Distance education at tertiary level should however be relevant to the needs of stakeholders and this is the issue which the paper aims to address.

An attempt will be made to provide insight into the issues facing higher education in South Africa. The role of the University of South Africa (Unisa) in university level distance education will be discussed and the use of strategic planning as a procedure to help departments to remain relevant to the needs of their stakeholders, will be presented.

Driving Forces at Work in Higher Education in South Africa

Four driving forces are due to play a significant role in the tertiary education sector in South Africa. Driving forces are those issues at work in an industry that require organizations to respond strategically (Thompson & Strickland, 1990). Garbers (1991) and Saunders (1992) have identified two

driving forces namely increased access to tertiary education and the maintainance of quality in the face of increasing numbers and diminishing resources. A third driving force is the need for technological development and skilled manpower to drive a technology-based economy (Garbers, 1991; Sunter, 1987). A fourth driving force is the constantly decreasing government subsidy which makes the operation of universities extremely difficult (Gourlay, 1991).

With respect to the issue of an increased demand for access to tertiary education, Dostal (1989) indicates that the total number of university students in South Africa will increase from 239100 in 1986 to 283000 in 2000 and 495000 in 2020. This represents more than a doubling of student numbers over a 34 year period.

The maintainance of quality in terms of the knowledge and skill standards expected of students at exit level, is a serious problem when seen against the academic unpreparedness at entry level of many of the new generation students. This unpreparedness is the result of long periods of inactivity due to school boycotts and strikes (Theron, 1992).

According to a report by the Committee of University Principals (CUP) (1987) there are too many students in the Arts and Humanities versus the students in the Science and Technology faculties. This should be seen against the assessment that the South African economy should be technology driven to generate enough income to meet the socio-educational-economic needs of the population (Sunter, 1987) and to not be left behind in the world-wide knowledge explosion (Toffler, 1990).

Reduced funds due to a protracted recession and annually decreasing government subsidies are forcing most universities to cut back on programs. The private sector is similarly experiencing reduced profits and can not be relied upon to fill the funding void.

The message which eminates from the analysis above, is that tertiary education institutions will have to take note of the changing environment and that pro-active attempts will have to be made to deal with the pressing issues.

The Role of Distance Education at University Level in South Africa

The discussion of the driving forces has emphasized one significant fact, namely that tertiary education (and particularly universities) in South Africa is faced with a huge and varied demand and inadequate resources. In this scenario, distance education is regarded as the most likely way to alleviate the problem (Pitman, 1980).

At university level South Africa is served by the University of South Africa as well as several residential universities which have started external programmes on a small scale.

Unisa has a current student enrolment of 120000. Fifty-four percent of the group can be termed black and 46% white. The majority of the students are South Africans but a significant proportion (12%) are resident elsewhere in Africa and other parts of the world (Pocket Statistics, 1992). The data serves to point out that Unisa currently provides tertiary education opportunities to many individuals who might not otherwise have had access to it.

In spite of the existing infrastructure for tertiary level education, the question of relevance still remains. Relevance would pertain to whether the needs of stakeholders are met. In a fast-changing environment it would be foolish to assume relevance if adequate control measures are not introduced. It is in this regard that a strategic planning exercise can produce both a pro-active planning document and a control procedure to maintain relevance.

A Model of Strategic Planning for Institutional Relevance

Although it is assumed that strategic planning is an ongoing activity at top management level, the emphasis in this paper is on planning in departments.

A number of strategic planning models for use in educational (Valentine, 1991) and other not-for-profit organizations (Bryson, 1988; Unterman & Davis, 1984) have been developed.

In Figure 1 a model of strategic planning for relevance, as conceived by the author, is presented.

Place Figure 1 about here.

The strategic planning process is divided into six phases. In Phase One, commitment to the planning process is sought, usually from the top management group, for without their support the exercise is bound to be fruitless. A planning team is then formed which would consist of members who have a significant input to make in the activities of the department.

Phase Two (Mandating) consists of the establishment of the official (external)

mandate assigned to the department by its mandating body (the wider organization). From the external mandate, the members establish an internal mandate which would refer to the department's business definition. The business definition firstly consists of the formulation of a mission statement and secondly of the clarification of the values on which the business will be built. These values will be transformed into broad objectives that underpin the mission statement.

Phase Three consists of data-gathering procedures. Various analyses are conducted to enable the planning team to understand the forces at work in the external and the internal environments. These analyses include the identification of stakeholders in the department, the establishment of their needs and the SWOT analysis. The SWOT analysis is a wellknown environmental scanning technique.

Phase Four involves the synthesis of the data into appropriate projects. A list of all possible projects are drawn up. These projects are then evaluated in terms of the priority they should receive in the longterm planning of the group, and the availability of resources to meet the requirements of the projects. This step is facilitated by the use of the nominal group technique (Rainey, 1991). On completion of the prioritization process, the detailed project planning can be done. Detail planning consists of the appointment of a project manager who drives the project. A project team is selected and time frames and resources are allocated. Within these parameters, the project has to be managed. This last step results in planning documents which provide both a future orientation and controllable goals.

Phase Five consists of the implementation of the project plans. This phase

normally stretches over a planning or budgeting cycle.

In Phase Six the outcomes of the project plans are evaluated. Evaluation is twofold. It can be done at the end of the planning cycle in which case it will indicate whether the department has been effective in conducting its business. It is also necessary that evaluation should be ongoing to ensure efficiency. Replanning can then be done timeously if serious planning gaps are identified.

The model of strategic planning for relevance was tested in the Student Services Bureau (SSB) at Unisa. The SSB is a professional department with a mandate to facilitate student development at the University. Space limitations do not allow for a detailed discussion of the process. The paper will conclude with some general comments from users and some provisos resulting from a real-life exercise.

Comments and Recommendations

In this paper a model of strategic planning for relevance was presented. Professional staff members of the SSB (n=7) who had formed the planning team, had responded very favourably to the planning experience. They felt that

* the projects aimed at achieving the mission and objectives of the department were more clearly defined and better coordinated than in the past;
* a greater sense of participation in planning was achieved; and
* the sharing of information provided a greater sense of belonging and team membership.

A word of caution should however be raised. Strategic planning without real commitment to the outcomes, will inevitably lead nowhere. Ample time should be devoted to Phases One and Two of the model which effectively set the scene for what will follow. Strategic planning should be promoted as an activity which every department should engage in on a regular basis. The model presented in this paper can be used for the exercise.

Every institution of higher education should consider the introduction of an organization development department, staffed with professionals. If distance education is to play the significant role that experts predict, then it should ensure that it is relevant to the thousands of lives which it will ultimately influence.

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Figure 1

A Model of Strategic Planning for Relevance